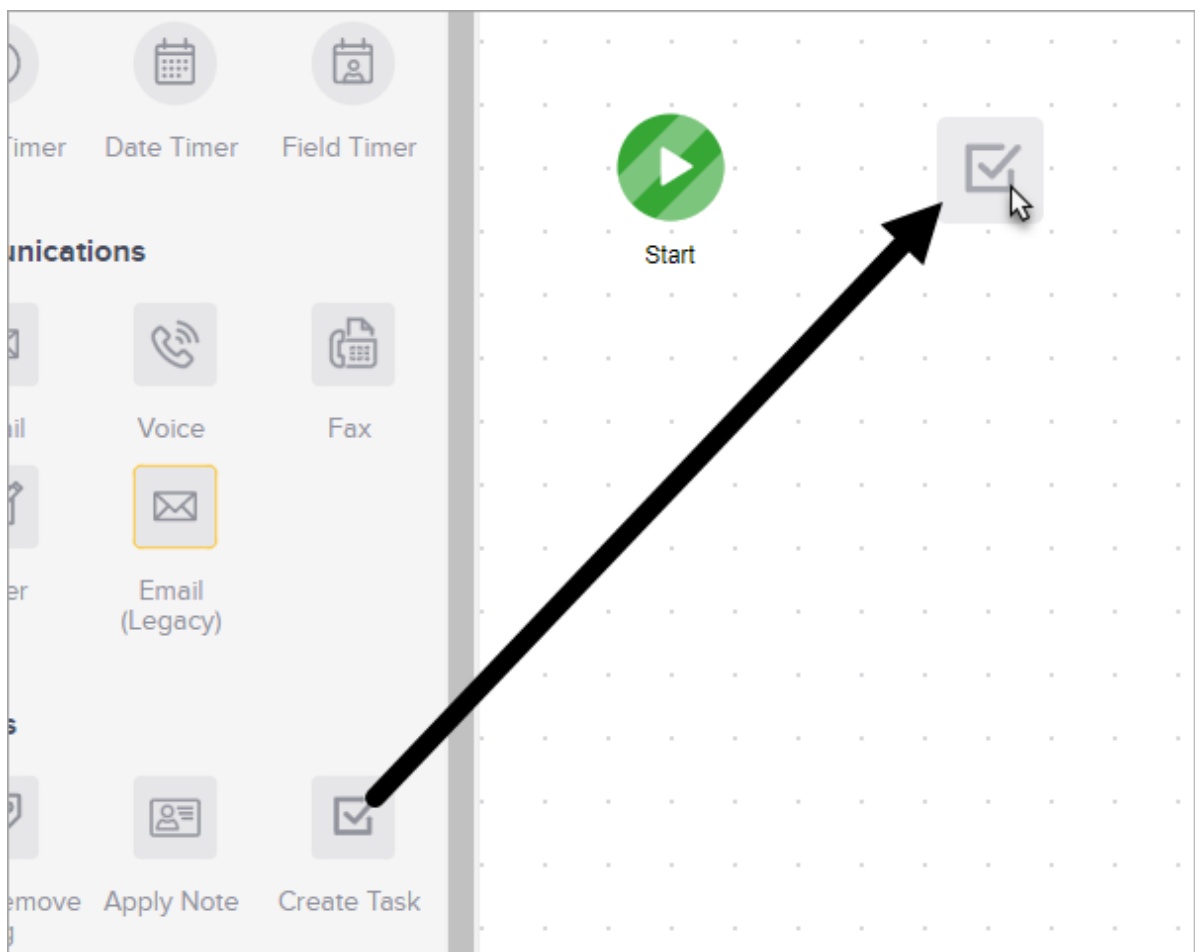


Automatically Create a Task in a Sequence

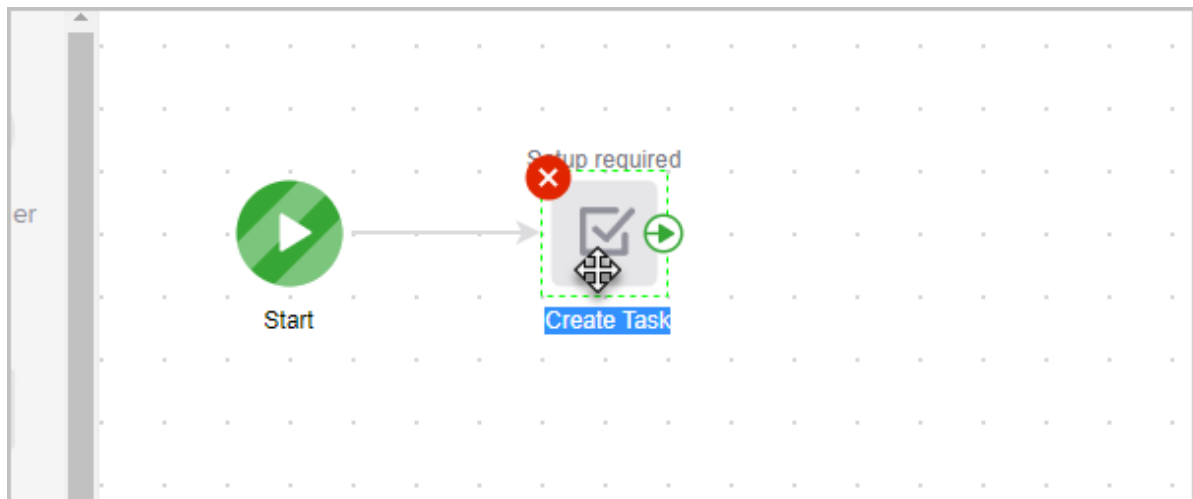
The task object assigns a manual follow-up responsibility to an Infusionsoft user. The tasks are generally related to predictable events, like a welcome call after a new customer purchases or 30 day phone survey. After a task is assigned, the user is responsible for manually updating it and adding a completion date.

Remember! Each task object must be configured individually. They cannot be re-used in multiple sequences or at more than one point in the same sequence. Task objects are not archived. If you delete a task object from a sequence, it can only be restored if you restore a previous version of the entire campaign.

1. Drag and drop a **Create Task** object onto the canvas.



2. Double-click it and select a **task type** from the drop-down.



3. Enter the **task title** and **body**. The title is displayed on the user's task list. The body information provides additional details when the user clicks on the title to view the task details. The body might contain instructions, a script, or a list of "to do" items related to this task.
4. **Assign the task:**
 - **Assign to Contact's owner:** Check the box if you want the user who is the assigned owner of the contact record to complete this task (e.g. sales rep.)
 - **Assign to (backup):** Select a backup user from the drop-down. This setting assigns a specific user to complete this task or assigns it to this user if no owner has been assigned to a contact.
5. Set a **due date, time, and priority**. The due date is different from the assign date. The task is created and assigned based on the sequence timer before it in the sequence. The due date is used to determine whether the task has been completed on time or is overdue. Priority is used to set the urgency level of the task.
6. **Notify (Optional):** Set up email notifications, check the box to have a notification sent to the Owner and/or type a user name into the search box and click on a name to select a user. Repeat the process to add more user notifications. Every time the sequence creates a task, these users will receive an email.
7. **Pop up reminder (Optional):** A browser pop-up will be triggered to remind the owner and users of the tasks approaching due date.

The screenshot shows a task configuration form with the following fields and callouts:

- 2**: Type * (Please select one)
- 3**: Title and Body (Merge button)
- 4**: Assign to (backup) * (Please select one)
- 5**: Days until due (0), Due at (Please select one), Priority * (Please select one)
- 6**: Notify owner (checkbox), Notify these users (Please select a user to notify)
- 7**: Pop up reminder (Please select one) before due date

8. Click **The Draft to Ready** slider to set the task to **Ready**.

The screenshot shows the task status bar with the following elements:

- Edit (disabled)
- Reporting (disabled)
- Stealth (dropdown)
- Actions (dropdown)
- Ready (slider, currently set to Ready)

9. You are now ready to publish your changes.